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ABSTRACT

This model curriculum guide for a two-year postsecondary office occupations course is intended to define and develop the knowledge, skills, and attitudes needed by office professionals to integrate the office resources of people and technology. The curriculum guide is organized in three sections. The introductory section describes the Professional Secretaries International (PSI) model curriculum and the organization of PSI, as well as providing an explanation of the project that developed the curriculum, an overview of the curriculum, and suggestions for adapting the model. The second section provides complete course descriptions for the first year. Courses to be included are keyboarding, document formatting, administrative support systems and procedures, fundamentals of business communications, information processing concepts and applications, document production/word processing, professional development, applied business communications, advanced word processing applications, and advanced information processing applications. The third section provides course descriptions for the second year. Courses include office supervision, office systems and technology management, and preparation for the Certified Professional Secretary examination. Each course description contains a rationale and overview, considerations, objectives, an outline of course content, and references. (KC)

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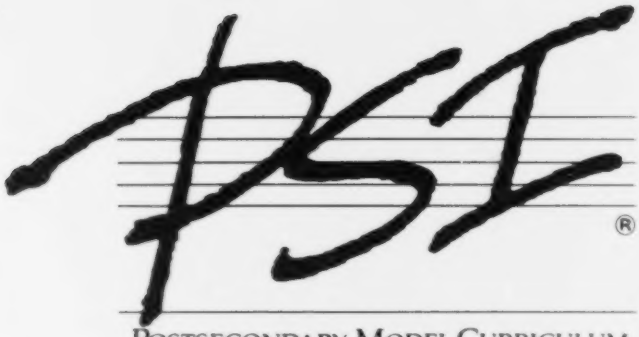

POSTSECONDARY MODEL CURRICULUM
FOR OFFICE CAREERS

Professional Secretaries International®
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Kansas City, Missouri 64111-1299

SOUTH-WESTERN
COLLEGE DIVISION

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INTRODUCTION

PSI® Postsecondary Model Curriculum

Needs of both students and employers are changing as the office environment becomes more automated. To meet this challenge, office personnel should develop traditional office skills with an increasing emphasis on productivity and accountability. They must also demonstrate these skills while using computer hardware and software. Employers in today's business climate need employees who possess excellent technical skills and a solid background in communication. These skills are required to successfully interact with clients/customers and coworkers.

Ironically, while the number of available office positions is increasing, enrollment in office career programs is decreasing. The situation presents both a challenge and an opportunity for educators. The PSI Postsecondary Model Curriculum for Office Careers has been developed to address many of the challenges facing office training today. These are specifically identified in Exhibit 1.

The overall purpose of the model curriculum is "to define and develop knowledge, skills, and attitudes needed by office professionals to integrate the office resources of people and technology." The curriculum is based on the current needs of both students and employers. Further, it provides necessary knowledge and skills needed in today's changing business environment.

Exhibit 1 Challenges Facing Postsecondary Office Training

- Researching curricula needs
- Updating curricula to meet current needs
- Developing methods of increasing student enrollments
- Providing continuing and adult education opportunities
- Marketing office education more effectively
- Addressing the rapid changes in technology
- Integrating human resources with technology
- Training students for increasing responsibilities
- Addressing national and local business needs
- Researching and validating office trends
- Validating curricula

Professional Secretaries International® (PSI)

Professional Secretaries International (PSI) is an international association for office professionals. Its purposes are to provide its membership and the profession with opportunities to: (1) develop leadership skills and abilities; (2) explore educational and professional developmental activities and resources; (3) examine and comment on relevant issues affecting the profession; (4) contribute and receive information concerning the future direction of business and office careers; and (5) become certified within the program. Appendix A provides more information about PSI and its programs.

Entry-Level Study

PSI conducts several research projects on a continuing basis to enhance the profession. One of the most comprehensive studies is the 1988 Entry-Level Study. This random survey of managers, educators, and practicing secretaries is designed to measure competencies necessary for entry-level office personnel. From this study, both the PSI Entry-Level Certification Program and the PSI Postsecondary Model Curriculum for Office Careers were developed.

A preliminary list of competencies was isolated and then refined with the assistance of managers, educators, secretaries, and a review of literature. The Entry-Level Study developed from these competencies. Specifically, the study was designed to collect three types of data: ratings on the specific defined competencies for entry-level personnel; the frequency of competencies used; and a determination of whether each competency was essential or nonessential for entry-level workers. "Job diaries" were written by entry-level personnel to provide additional information. A second modified survey was sent to another random sample of the same types of groups to validate the original information.

Those competencies recognized as important, frequently used, and essential became the basis for the courses in the postsecondary curriculum. (For more information on the Entry-Level Study, contact PSI. Please refer to Appendix A for address information.)

National Postsecondary Curriculum Task Force

The National Secondary Curriculum Task Force encouraged PSI to explore the needs and concerns of postsecondary educators following the completion of the PSI Office Opportunities Model Curriculum for Secondary Business Education. Thus, the National Postsecondary Curriculum Task Force was created (see Appendix D). Representation included educators from all types of postsecondary institutions, as well as practicing secretaries, employers, administrators, and curriculum specialists. The charge of the task force was to examine critical issues in postsecondary curricula, pinpoint where traditional curricula were weak or failing, make recommendations for curriculum philosophy, and propose a direction

for curriculum development. In addition to these objectives, the task force formulated a basic list of recommendations about the development of a postsecondary model curriculum (see Exhibit 2).

Exhibit 2 Curriculum Development Recommendations

- Address increasing demands that are made on today's office workers resulting from new technology, increased responsibility, and downscaling of company size.
- Market business programs to students and employers to increase enrollments.
- Solicit input from businesspersons, educators, and office professionals to identify marketable employee skills that allow for career growth and job satisfaction.
- Make the curriculum flexible and adaptable. It should incorporate state-of-the-art equipment and concepts; yet, suggest ways individual institutions can accommodate the curriculum to their unique situations and adapt to technological changes.
- Provide multiple entry and exit points to meet the needs of the postsecondary student population today.
- Recognize that each institution is responsible for developing the standards of proficiency necessary to enter a specific program. Thus, a preliminary survey of students' abilities and experiences is vital to the success of any curriculum.
- Consider students' life/work experiences when recommending placement and course sequences.
- Focus on technology, interpersonal skills, the value of teamwork, and professionalism.
- Specialization is desirable; therefore, provide opportunities to specialize.
- Emphasize broad knowledge and skills as well as specific technological skills.
- Provide opportunities for using specific hardware and software, but emphasize generic concepts. Promote the transfer of learning to other equipment or programs.
- Gear training to industry and community needs but design it to be universal to accommodate increasing mobility of employees and employers.
- Encourage participation in student organizations to promote professionalism, skill application, and leadership development.

National Postsecondary Curriculum Writing Team

The National Task Force outlined institutional, educator, student, and employer needs and concerns (as well as the recommendations to consider), and a committee of curriculum writers was selected. Chosen individuals represented a cross-

section of instructors and curriculum specialists from postsecondary vocational technical schools, independent colleges, junior and community colleges, and colleges and universities nationwide (see Appendix D).

In four 3-day meetings, the writing team reviewed results of the Entry-Level Study, recommendations from the task force, other curriculum models, and relevant research. From these reviews, they developed broad goal statements and matched them with identified competencies from the Entry-Level Study. Competencies that clustered into logical and pedagogically sound instructional units became the framework for course design. Objectives, specific course descriptions, and outlines followed. Objectives for the curriculum are identified in Exhibit 3.

Exhibit 3 Curriculum Objectives

- Employment of individuals
- Preparation of individuals for entry-level positions according to employers' needs
- Preparation of workers with knowledge and skills for professional advancement and promotability
- Validation of demonstrated competencies via certification of knowledge and skills
- Enhancing the marketability of curricula

Curriculum Validation

A formal validation of the curriculum was conducted prior to completing the final draft of the model curriculum. Additional suggestions and points for consideration were provided by: (1) six focus groups in the United States and Canada consisting of practicing secretaries at the entry level and CPS level, managers, and educators; and (2) seventy-five critical reviews by mail and telephone by state departments of education, department chairs, and educators from all types of postsecondary institutions (see Appendix D). Comments were analyzed, discussed, and incorporated into a final revision of the curriculum document.

Curriculum Overview

The Postsecondary Model Curriculum For Office Careers is designed for programs in independent colleges, junior and community colleges, vocational technical colleges, adult education, and two-year programs in colleges.

The curriculum provides for multiple entry and exit points and allows students to demonstrate and certify competencies. An individual is prepared to sit for either or both the Entry-Level and Certified Professional Secretary® (CPS®) Examinations, and, by completing all four semesters, may receive an associate degree. Many student outcomes may be achieved through the curriculum, including those outlined in Exhibit 4.

Exhibit 4 Outcomes of Postsecondary Model Curriculum

- Employment of individual
- Various certificates of completion (for each semester)
- Opportunities to prepare for and take the entry-level examination and become certified
- Opportunities to prepare for and take the Certified Professional Secretary (CPS) Examination and become certified
- Specialized education and training using computer hardware and software
- Development of effective personal and interpersonal skills
- Education in a capstone specialized area
- Attainment of an associate degree

Curriculum Sequencing

For detailed illustrations of the curriculum sequencing for the PSI Postsecondary Model Curriculum, see page 8.

Year One

Semesters One and Two. Year One contains courses providing students with education and training in basic technical and interpersonal skills. Specifically, the purposes of Year One are to:

1. Encourage individuals to enter the profession.
2. Provide basic job skills for entry-level positions.
3. Accommodate individuals reentering the job market.
4. Provide an upgrading of skills for persons who need retraining in order to maintain present positions or obtain promotions.
5. Provide multiple exit options including immediate employment, a certificate of completion,and preparation for PSI entry-level certification.

The first year is designed to give students broad transferable skills with basic skills being reinforced throughout the courses. Traditional office skills are put into perspective in light of current office research, with the focus being placed on those skills that increase one's marketability in the workplace. Also, computer hardware and software should be used to gain the needed hands-on experience for current and future technology. Certain traditional courses may not appear in the course listing; however, they may still be included by an institution as recommended electives (see page 8 for illustration).

In addition to the required courses, each semester has two nonspecified elective courses. These electives may be used for general education requirements, or the institution may opt to move courses from semesters three or four to semesters one and two in place of the electives.

Students will enter this program with varying levels of basic skills. A high-school diploma and certain basic skills should be minimal entrance requirements; however, individual institutions should define their own specific requirements and designate proficiency levels. Each student should be evaluated prior to entering the program. Some institutions may want to give credit for relevant life or work experiences. In addition, Year One of this curriculum may be expanded to encompass three or four semesters to assist schools that desire a slower-paced program or that are on a quarter system.

Further, related work experiences for the student can be integrated into this curriculum. A properly supervised and scheduled experience integrates all components of the curriculum. Likewise, participation in a student organization provides the student with experiences in leadership, group decision-making, administrative skill-building, and opportunities to practice classroom skills in real life situations. Affiliation with any recognized professional student association is encouraged.

Finally, Year One emphasizes working with others as a part of an office team. It also allows the student to perceive the office as an integrated system of people, equipment, and procedures--providing the student with a unique vantage point. The sequence of courses presented during the first year enables an individual student to expand job functions and to create career opportunities. Further, semesters one and two enhance flexibility by teaching students to adapt as office situations change, responsibilities increase, and other opportunities develop.

Year Two

Semester Three. This semester focuses on career options and provides students with an opportunity to select a specialty area. Also, it provides the fundamental knowledge and skills to either pursue a specialty office degree program or perform specialty tasks for an employer. Appropriate specialties have been identified in the course curriculum (see course illustration on page 8). Professional allied associations have developed the two specialty courses in their

content areas for certain specialties. These associations were selected because of their documented excellence and close affiliation with skills and knowledge required. Specialty areas with an asterisk--see course illustrations--have course descriptions available from South-Western Publishing Company in white paper form. Institutions may want to substitute their own specialty courses for the ones listed. They may also want to work with local industries to provide specialty skills for area markets. Although this model recommends that both specialty courses be taken in the third semester, institutions may choose to offer the specialty courses over two semesters, especially if one course is a prerequisite for the other.

Further, semester three, the "Careers Options Semester," is marketable to the many individuals who have completed some postsecondary education and may want to return to school to gain skills for promotability or to expand career options. The specialty courses, Office Systems and Technology Management, and Office Supervision would be excellent courses for individuals who are already employed and accepting responsibility for supervising people, work flow, and/or systems. These courses are also appropriate for individuals seeking responsibility in new areas, such as desktop publishing or information management. A school may choose to present students with certificates of completion for taking the specialty courses.

Semester Four. This semester is the "Professional Semester." During this time, an individual prepares for the CPS Examination. Traditional academic courses offered by the institution provide the basics for the six-part examination. Office Administration, Communication, and Office Technology will have been covered previously in the first three semesters. The remaining content is contained in the following courses: Behavioral Science in Business or Applied Psychology, Business Law, Principles of Economics, and Principles of Management. Principles of Accounting I is recommended for semester three because it is a prerequisite to Principles of Accounting II.

Although a "review course" may be offered at the end of the semester, the courses listed here are each full-credit courses. It is shown in a one semester format; however, institutions may opt to rearrange the courses to be taken over a number of semesters. This approach has the advantage of blending skill and academic courses while allowing advanced skill courses to be completed immediately prior to exiting from the program. CPS preparatory courses may also be scheduled in earlier semesters as electives (see Appendix C).

A person completing the fourth semester of study would be prepared to sit for the CPS Examination and to enter the job market with certified skills (the experience requirement would still have to be met to receive the official certification). Also, after the fourth semester the student will be awarded an associate degree. A student could choose to and would be prepared to enter a four-year degree program when he or she so desires. Degrees in accounting, office careers, office systems, and office or business administration could be pursued.

YEAR ONE

Semester 1

Document Formatting*
Administrative Support Systems and Procedures
Fundamentals of Business Communications
Information Processing Concepts and Applications

Electives/General Education Requirements:

Participation in a student organization is recommended.

* Prerequisite: Keyboarding

Semester 2

Document Production/Word Processing
Professional Development
Applied Business Communications

Choose one:
Advanced Word Processing Applications *or*
Advanced Information Processing Applications

Electives/General Education Requirements:

Participation in a student organization is recommended.

YEAR TWO

Semester 3

Office Systems and Technology Management
Office Supervision

Specialty Areas:

- Information management
- Desktop publishing*
- Office systems
- Legal*
- Medical

Students choose a Specialty Area related to their interests, local industry needs, faculty or institution expertise. Each Specialty Area contains two required courses.

Electives/General Education Requirements:

Principles of Accounting I

Supervised work experience and participation in a student organization are recommended.

Semester 4

Recommended Courses for CPS® Preparation:

- Business Law
- Principles of Economics
- Behavioral Science in Business/ Applied Psychology
- Principles of Management
- Principles of Accounting II

Electives/General Education Requirements:

Supervised work experience and participation in a student organization are recommended.

Adapting the Model

The names of the courses have been chosen to reflect actual course content and current job functions. Individual institutions may have similar courses with different names which could be used. Care has been given to course titles to assure that they will be offered most appropriately through the business department.

Proficiency standards have intentionally been left open-ended so that individual institutions may determine their own levels. In addition, levels may vary with area employers and student population. The purpose of the curriculum is to incorporate state-of-the-art technology; however, not every school may have a full complement of computer equipment. Because of this fact, suggestions on adapting courses to an institution's available equipment have been made. Finally, although the curriculum model has been designed for a semester system, courses can be broken down into smaller units for a quarter.

The following suggested course credit shown below may be used to accommodate general education requirements for the associate degree.

Suggested Course Requirements

* = English Credit
** = Social Science Credit
*** = Used to fulfill General Education requirement

Semester 1

(Prerequisite: Keyboarding)
Document Formatting
Administrative Support Systems and Procedures
* Fundamentals of Business Communications
Information Processing Concepts and Applications
*** Elective
*** Elective

Semester 2

Document Production/Word Processing
Professional Development
* Applied Business Communications
Choose one:
Advanced Word Processing Applications
or
Advanced Information Processing Applications
*** Elective
*** Elective

Semester 3

Specialty Course
Specialty Course
Office Supervision
Office Systems and Technology Management
Principles of Accounting I
*** Elective

Semester 4

** Behavioral Science in Business/Applied Psychology
Business Law
** Principles of Economics
Principles of Management
Principles of Accounting II
*** Elective

COMPLETE COURSE DESCRIPTIONS

FIRST YEAR

The first year of study is composed of two basic technical/interpersonal office skills semesters. These semesters are designed to provide students with:

- incentives to enter business and office careers.
- opportunities to update knowledge and skills to reenter the marketplace.
- retraining in order to maintain a present position or obtain a promotion.
- employable skills to obtain a position where office technology and effective interpersonal relations are valued and used.
- realistic, relevant experiences to simulate office tasks and job functions required of entry-level workers.
- assistance in the development of a positive work attitude and techniques for continuing professional activities.

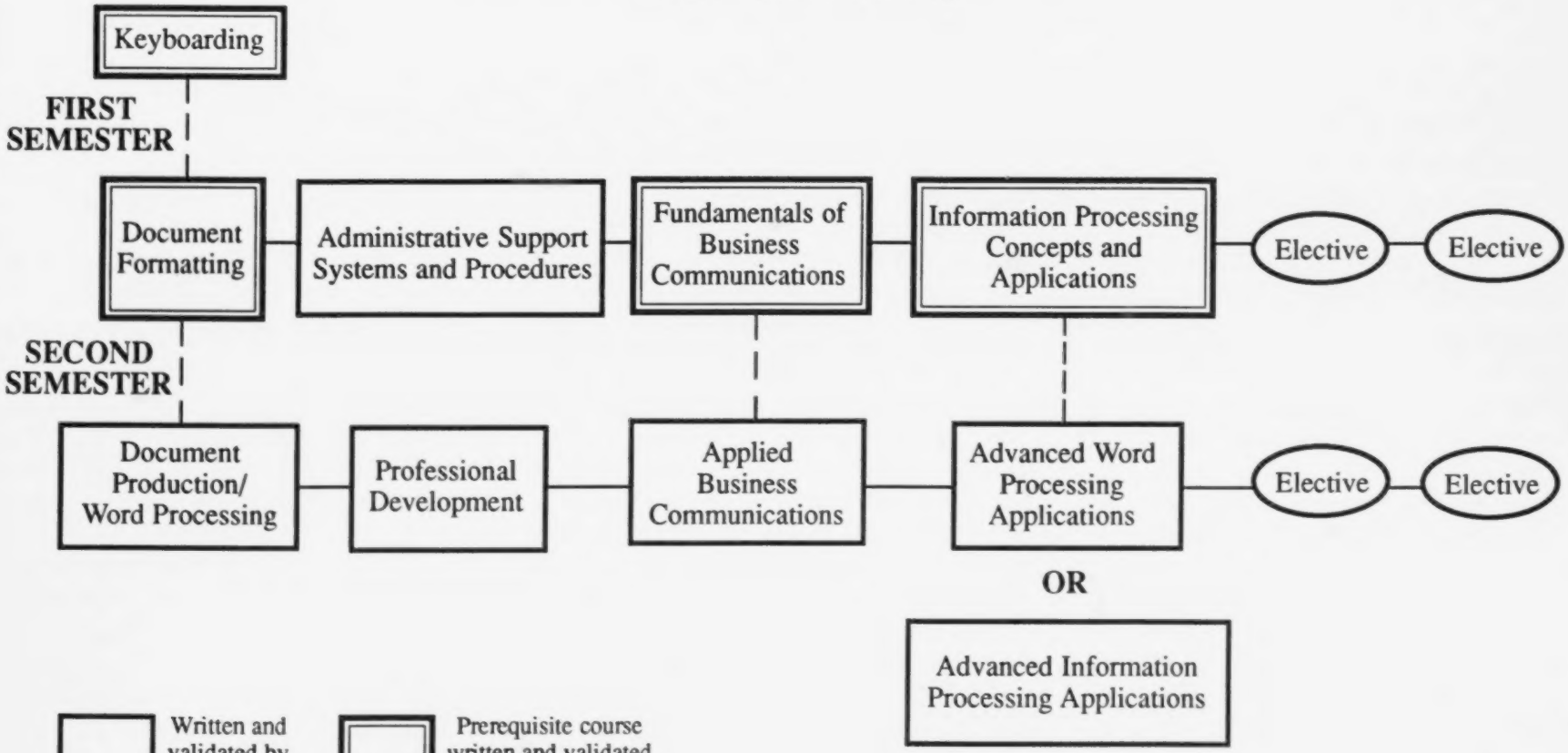
Each semester allows for two electives or general education courses which will help students meet entry-level certification requirements and/or work toward obtaining an associate degree.

Student Outcomes of the First Year

- Basic technical and interpersonal skills required for entry-level office careers
- Certificate of completion
- Increased employability
- Preparation for entry-level examination and certification

PSI Postsecondary Model Curriculum

First Year of Study



Qualifications: PSI Entry-Level Certification

Keyboarding

This course is designed to introduce students to keyboarding and basic formatting techniques. Emphasis is on mastery of the keyboard, developing basic keyboarding skills, improving language arts skills, developing basic composition skills, and formatting basic computer compatible documents including personal letters, block style letters, memos, envelopes, tables, reports, outlines, and centered material such as announcements.

Considerations

The Keyboarding course is a prerequisite to the Document Formatting course. Most students will enter the curriculum having already attained the skills and knowledge required in this course. These skills could have been acquired on traditional or electronic equipment. The Document Formatting course should be the first course in the Keyboarding/Document Formatting/Document Production sequence for students who have already attained the prerequisite keyboarding skills and knowledge. The Keyboarding course should be offered only for those students who have not attained the prerequisite keyboarding skills and knowledge. It may be taught on either traditional or electronic equipment.

Speed and accuracy competencies should be specified by the institution to meet its program goals.

Objectives

After completing this course the student should be able to

1. Demonstrate good keyboarding techniques
2. Demonstrate mastery of alphabetic, numeric, symbol, and function keys
3. Keyboard at a specified rate
4. Keyboard with accuracy
5. Apply basic language arts skills
6. Compose basic business documents
7. Format computer-compatible business documents

Contents

I. KEYBOARDING

- A. Introduction to the Equipment Utilized
- B. Presentation of the Alphabetic Keys
  1. Keyboarding techniques
  2. Skill-building activities
- C. Presentation of the Numeric and Symbol Keys
  1. Keyboarding techniques
  2. Skill-building activities
- D. Building Skill from Various Source Copy
  1. Straight copy
  2. Script
  3. Rough draft
  4. Statistical copy
- E. Learning Basic Word Processing Functions
  1. Enter text
  2. Store text
  3. Print
  4. Center
  5. Tab

II. INTEGRATING AND APPLYING COMMUNICATION SKILLS

- A. Language Arts Skills
- B. Basic Composition Skills
- C. Proofreading and Editing Skills

III. BASIC FORMATTING

- A. Page Arrangement and Layout
  1. Page format and copy placement
  2. Centering
  3. Tabulation
- B. Formatting Basic Computer-Compatible Documents
  1. Personal business letter
  2. Outline
  3. Unbound report
  4. Block-style letter
  5. Memo
  6. Simple tables (main and secondary headings)
  7. Centered documents (announcements, etc.)

Endorsed Textbooks

Basic Information Keyboarding Skills: A Collegiate Course (Z16)
Robinson, Beaumont, Crawford, Erickson, Ownby

or

College Keyboarding/Typewriting (T75)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Intensive Course (T27)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Basic Course (T28/T31)
Duncan, Warner, Langford, VanHuss

or

MLS College Typewriting, Basic Course (Z21/Z24)
Wanous, Duncan, Warner, Langford

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Document Formatting

This course builds on the keyboarding competencies students have developed. Emphasis is placed on increasing speed, improving accuracy, learning word processing functions, developing formatting skills, applying communication skills, and learning document production skills. (Prerequisite: Keyboarding course or equivalent skills and knowledge)

Considerations

Initial skills of each student should be assessed. Speed and accuracy competencies should be specified by the institution to meet its program goals. It is recommended that this course be taught on electronic equipment.

Objectives

After completing this course, the student should be able to

1. Demonstrate improved keyboarding techniques
2. Keyboard at specified speed levels
3. Keyboard accurately
4. Apply language arts skills
5. Compose business communications at the keyboard
6. Format a variety of business documents effectively
7. Demonstrate basic document production skills

Contents

I. IMPROVE KEYBOARDING SKILLS

   A. Introduce the Equipment Utilized

B. Build Keyboarding Skills
   1. Improve keyboarding speed
   2. Improve keyboarding accuracy

C. Improve Ability to Follow Instructions and Work with Different Types of Source Copy
   1. Straight copy
   2. Script
   3. Rough draft
   4. Statistical copy

II. APPLY COMMUNICATION SKILLS

A. Proofread and Edit
B. Compose Documents
C. Design Basic Forms

III. REVIEW/LEARN WORD PROCESSING FUNCTIONS

A. Basic Word Processing Functions
   1. Enter
   2. Format
   3. Store/retrieve
   4. Print

B. Edit Functions
   1. Insert
   2. Delete
   3. Replace
   4. Move
   5. Copy

C. Locate Functions
   1. Locate documents
   2. Locate positions within documents
   3. Locate text
      a. Search
      b. Global search and replace

D. Basic Merge Functions

IV. FORMAT BUSINESS DOCUMENTS

A. Letters
   1. Block format
   2. Modified-block format
   3. Simplified (computer-compatible format)
   4. Letters with tables
   5. Letter reports

B. Memoranda
   1. Standard memos
   2. Simplified memos (computer-compatible format)
   3. Memos with tables
   4. Memo reports

C. Tables
   1. Block column headings
   2. Centered column headings
   3. Tables with leaders
   4. Tables with source notes
   5. Tables with double line entries
   6. Boxed tables
   7. Tables with braced headings

D. Reports
   1. Leftbound
   2. Unbound
   3. Reports with tables
   4. Table of contents
   5. References
   6. Title pages

E. Communications With Special Features
   1. Attention line
   2. Reference line
   3. Subject line
   4. Multipage documents
   5. Mailing notations
   6. Enclosures
   7. Copy notations
   8. Postscript

F. Form Communications
   1. Letters with variable information
   2. Memos with variable information
   3. Documents from stored paragraphs

G. Business Forms
   1. Purchase order
   2. Invoice
   3. Expense report
   4. Designing forms

H. Administrative Communications
   1. Agenda
   2. Minutes
   3. Press release
   4. Itinerary

I. Employment Documents
   1. Application letter
   2. Personal data sheet or resume
   3. Application form

V. BUILDING BASIC PRODUCTION SKILLS

   A. Introduction to Document Production
   B. Building Basic Production Skills

Endorsed Textbooks*

College Keyboarding/Typewriting (T75)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Intensive Course (T27)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Intermediate Course (T29/T32)
Duncan Warner, Langford, VanHuss

or

MLS College Typewriting, Intermediate Course (Z22/Z25)
Wanous, Duncan, Warner, Langford

*If taught using microcomputers and software, also use one of the texts approved for Advanced Word Processing Applications or *Learning About Computers* (25622), Coburn.

Administrative Support Systems and Procedures

This course is designed to introduce administrative systems and procedures used to process information in the integrated office. Emphasis is on concepts and appropriate software applications. Topics include organization concepts, skills, and procedures; capturing, storing and retrieving information; traditional and electronic information resources; decision making; and communication systems.

Considerations

The use of software applications programs or demonstrations of various software applications are recommended.

Objectives

After completing this course, the student should be able to

1. Identify and explain organizational concepts, skills, and procedures relating to work flow; work organization; productivity; time management; and automated workstation environments
2. Describe and apply the capturing, storing, and retrieving of information
3. Identify and describe traditional and electronic information resources
4. Explain how problem solving and decision support are an integral part of administrative systems and procedures
5. Identify and describe the various mail and telephone procedures and systems used for communication in the automated office

Contents

I. INTRODUCTION TO ADMINISTRATIVE SUPPORT

II. ORGANIZATION CONCEPTS, SKILLS, AND PROCEDURES

A. Work Flow
   1. Technology and the work flow
   2. People in the work flow
   3. Work flow analyzed

B. Work Organization
   1. Organization charts
   2. The traditional/integrated office
   3. Administrative support for the integrated office
   4. Team support philosophy
   5. Maintenance of a well-organized workstation

C. Productivity and Procedures
   1. Need for increased productivity
   2. Issues and considerations
   3. Methods for increasing productivity
   4. Considerations for implementation
   5. Managing for more productivity
   6. Prioritizing
   7. Effectiveness and efficiency
   8. Automating and integrating other office functions
   9. Using software for productivity

D. Time Management
   1. Orientation and need
   2. Analysis of time usage
   3. Related software programs and their use

E. Automated Workstation Environments
   1. Ergonomic considerations
   2. Personal issues
   3. Technological issues

III. CAPTURING, STORING, AND RETRIEVING INFORMATION

A. Recordkeeping and Business Transactions
   1. Daily recording of activities
   2. Gathering of data
   3. Inputting of daily transactions in master file on system
   4. Introduction of integrated accounting systems and how entry affects other journals
   5. Order entry

B. Filing Systems
   1. Types of filing systems
   2. Basic rules and standards
   3. Technology and filing procedures

C. Records Management
   1. Classification of records

2. Filing and storage concerns
3. Computer databases
4. Micrographics
5. Records retention
6. Records management personnel

IV. TRADITIONAL AND ELECTRONIC INFORMATION RESOURCES

A. Information Resources
   1. Traditional
   2. Electronic
   3. Videotext
B. Database Information Utilities
   1. Database management systems (DBMS)
   2. Teletext
   3. Videotext
   4. Database services
      a. Public
      b. Proprietary

V. DECISION MAKING

A. Definition and Process
B. Decision Support Software
   1. Decision support defined
   2. Basic concepts

VI. COMMUNICATIONS SYSTEMS

A. Mail Systems and Services
B. Telephone Systems and Procedures

Endorsed Textbooks

Word/Information Processing — A System Approach (W85)
Casady
Intensive Files Management (K27)
Henne

or

Procedures for the Professional Secretary (K95)
Fulton, Hanks

Fundamentals of Business Communications

This course is designed to provide the foundation for effective business communications. It will focus on the fundamentals of English and the established standards of usage while emphasizing their importance in the business world. Students will develop notetaking and transcription skills as they relate to document development and office productivity. Proofreading and editing applications will stress the knowledge and skills needed for managing the accuracy and quality of document creation and production.

Considerations

It is recommended that appropriate courseware/software be used to enhance the learning process and the achievement of course objectives.

Objectives

After completing this course, the student should be able to

1. Identify the parts of speech and uses
2. Identify the parts of sentences and uses
3. Write effective sentences and paragraphs
4. Properly apply the mechanics of punctuation, capitalization, abbreviations, number usage, word usage, and spelling
5. Apply the fundamentals of basic composition to produce effective business communications
6. Take notes and record information accurately
7. Accurately transcribe written and recorded information
8. Proofread and edit communications
9. Describe the use of technology in the recording, translation, and distribution of information

Contents

I. BASIC ENGLISH

- A. Parts of Speech
  1. Nouns
  2. Verbs
  3. Pronouns
  4. Adjectives
  5. Adverbs
  6. Prepositions
  7. Conjunctions
  8. Interjections
- B. Parts of a Sentence
  1. Subject and predicate
  2. Phrases and clauses
- C. Types of Sentences
  1. Declarative
  2. Interrogative
  3. Imperative
  4. Exclamatory
- D. Styles of Sentences
  1. Simple
  2. Compound
  3. Complex
  4. Compound-complex

II. MECHANICS

- A. Punctuation
- B. Capitalization
- C. Abbreviations
- D. Number Usage
- E. Word Usage
- F. Spelling

III. BASIC COMPOSITION

- A. Sentence Development
- B. Paragraph Development
- C. Basic Document Development

IV. RECORDING INFORMATION

- A. Messages and Instructions
- B. Minutes
- C. Summaries and Abstracts

V. INTRODUCTION TO TRANSCRIPTION

- A. Written
- B. Machine

VI. PROOFREADING AND EDITING

- A. Proofreading
- B. Editing
- C. Resources
  1. Hardcopy
  2. Software

Endorsed Textbooks

Effective English for Colleges (E33)
Burtness, Hulbert

Programmed Proofreading (W02)
Dewar, Daniels

Managerial Dictation (G95)
Saffer

Information Processing Concepts and Applications

This introductory course is designed to present concepts of information/word processing as well as the opportunity to perform basic applications in word processing, database, spreadsheets, graphics, desktop publishing, and telecommunications; to graph spreadsheet and database applications; and to telecommunicate documents. In addition, basic commands of operating systems will be presented.

Considerations

The main objective of this course is to integrate concepts with actual hands-on experience. Each institution will need to decide, according to needs related to its geographic region and employer requirements, the appropriate balance of concepts and applications.

If an institution has a prerequisite course for operating systems, Section II may be omitted. If an institution also has a prerequisite course of word processing, Section III can be omitted. It is recommended that institutions acquire graphic boards and modems to achieve the objectives of the graphing and telecommunicating sections.

Objectives

After completing this course, the student should be able to

1. Describe the functions of the operating system and its relationship to application software programs

2. List and describe the advantages and disadvantages of the five types of input: longhand, shorthand, composing at the system, optical character recognition (OCR), and machine dictation

3. Describe the basic functions of word processing software and use them to produce documents

4. List and describe the advantages and disadvantages of various print technologies

5. Describe the basic functions of database applications software and use database software

6. Describe the basic functions of spreadsheet application software and use spreadsheet software

7. Describe the basic functions and types of graphs and use graphics software

8. Describe the basic functions of desktop publishing software and use desktop publishing software

9. Describe the basic functions of telecommunications and use telecommunications software

Contents

I. INTRODUCTION TO COURSE

- A. Introduction to Microcomputers
- B. Hard Disk/Diskette Storage and File Management

II. INTRODUCTION TO OPERATING SYSTEMS

- A. Directory Commands
- B. Formatting of Diskettes
- C. Copy, Rename, Delete Files
- D. Copy Diskettes
- E. Backup

III. INTRODUCTION TO WORD PROCESSING

- A. Uses of Word Processing
- B. Word Processing Functions and Software Structure
- C. Keyboarding a Document
- D. Revising — Insert, Delete, Copy, Move
- E. Searching and Replacing
- F. Formatting
- G. Storing and Retrieving
- H. Printing
- I. Transcribing Documents for Mailable Copy

IV. GRAMMAR AND SPELLING VERIFICATION

V. INTRODUCTION TO PRINT TECHNOLOGIES

A. Dot Matrix
B. Daisy Wheel
C. Thermal
D. Inkjet
E. Laser
F. Plotter

VI. INTRODUCTION TO DATABASES

A. Uses of Database
B. Database Structure and Commands
C. Creating a File and Entering New Records
D. Viewing Existing Data
E. Retrieving a Stored Database
F. Changing Data in Existing Records
G. Storing Files
H. Retrieving Simple Report Formats
I. Printing Using Report Formats

VII. INTRODUCTION TO SPREADSHEETS

A. Uses of Spreadsheets
B. Spreadsheet Structure and Commands
C. Creating a Spreadsheet
D. Retrieving and Deleting an Existing Spreadsheet
E. Entering Data into a Stored Spreadsheet
F. Correcting Errors in Existing Spreadsheets
G. Changing Data
H. Storing and Renaming Revised Spreadsheets
I. Using Common Spreadsheet Formulas
J. Asking "What If" Questions with Spreadsheets
K. Changing Formats in an Existing Spreadsheet
L. Printing a Spreadsheet

VIII. INTRODUCTION TO GRAPHING

A. Uses and Types of Graphs
B. Graphing Structure and Basic Commands
C. Viewing Existing Graphs
D. Retrieving Stored Spreadsheets and/or Database and Converting Data to Graph Format

E. Storing a Graph Format
F. Changing Graph Type
G. Changing Graph Format
H. Printing a Graph
I. Integrating Graphs with Text (Desktop Publishing)

IX. INTRODUCTION TO TELECOMMUNICATING USING A MICROCOMPUTER

A. Uses and Types of Telecommunications
B. Hardware and Software Requirements for Telecommunications
C. Telecommunications Software Structure and Commands
D. Point-to-Point Telecommunications
E. Point-to-Host Telecommunications
F. Information Utilities
G. Electronic Bulletin Board Services
H. Micro to Mainframe Messaging and Document Exchange
I. Networking Microcomputers

Endorsed Textbooks

Using Computers: Lab Manual (J762)
Martin
Learning About Microcomputers (25622)
Coburn

Document Production/Word Processing

This course is designed to provide experience producing documents found in typical business offices. Documents should be representative of those prepared both in entry-level and advanced positions in a variety of industries. The major focus of the course is on productivity and excellence in document production. Emphasis is also placed on the mastery of word processing functions, composition skills, and the application of communication skills. (Prerequisite: Document Formatting)

Considerations

This course may be taught using the document production materials from a keyboarding/formatting/document production textbook, or it may be taught using word processing materials with software. Realistic source copy should be used, and documents should be comparable to those found in business offices. The use of activities simulating a variety of different types of offices (such as manufacturing, marketing, accounting, education, government, etc.) is encouraged.

Each institution should specify the competencies required to meet its program goals. It is strongly recommended that this course be taught utilizing electronic equipment.

Objectives

After completing this course, the student should be able to

1. Accept responsibility for the quality of documents
2. Produce documents at a specified rate
3. Demonstrate mastery of word processing functions
4. Compose business documents
5. Apply communication skills

Contents

I. INTRODUCTION TO EQUIPMENT/SOFTWARE UTILIZED

II. PRODUCTION OF VARIOUS TYPES OF DOCUMENTS

- A. Text
- B. Correspondence
- C. Repetitive Correspondence
- D. Tables and Columnar Documents
- E. Document Assembly
- F. Form Design and Production

III. TYPES OF INDUSTRIES

- A. General Office
- B. Legal
- C. Medical
- D. Engineering/Technical
- E. Industries of Local Importance

IV. REFINE KEYBOARDING, WORD PROCESSING, AND COMMUNICATION SKILLS

- A. Build Skill from Various Types of Source Copy
  1. Straight copy
  2. Script
  3. Rough draft
  4. Statistical copy
- B. Learn Additional Word Processing Functions
- C. Apply Word Processing Functions
- D. Apply Communication Skills
- E. Measure Production Skills

Endorsed Textbooks*

College Keyboarding/Typewriting (T75)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Intensive Course (T27)
Duncan, Warner, Langford, VanHuss

or

College Keyboarding/Typewriting, Advanced Course (T30/T33)
Duncan, Warner, Langford, VanHuss

or

MLS College Typewriting, Advanced Course (Z23-Z26)
Wanous, Duncan, Warner, Langford

Idlewood College — Typewriting Simulation (T48)
Stengel, Bennett

or

Excursions International — A Word Processing Simulation (W45)
Spring, Rider, Jackson

*If taught using microcomputers and software, also use one of the texts approved for Advanced Word Processing Applications, *Learning About Computers* (25622), or *Microcomputer Keyboarding/Formatting Applications* (Z10U).

Professional Development

This course is designed to provide an awareness of the "people" skills essential for job success. Topics include developing a positive self-image, a professional self-image, ethics, time management, human relations and communications skills, organizational dynamics, and professional development.

Considerations

Heavy emphasis should be placed on teamwork. Class discussions, group projects and presentations, role-playing, and simulations are excellent forums for encouraging interaction among students. Students should be provided opportunities to assume leadership roles. Participation in student organizations should be an integral part of this course.

Oral communication skills can be strengthened through debates, discussions, and presentations. Written communication skills can be strengthened through writing solutions to cases and papers.

Community resources such as guest speakers should be utilized.

Objectives

After completing this course, the student should be able to

1. Identify and demonstrate personal and professional characteristics associated with job success
2. Formulate personal, educational, and professional goals; and develop an action plan to meet those goals
3. Project a professional image
4. Develop a personal code of business ethics
5. Apply effective time and stress management techniques
6. Apply effective job-seeking skills
7. Demonstrate effective human relations and communication skills

8. Demonstrate the ability to analyze and solve problems

9. Describe and evaluate the implications of organizational dynamics

10. Demonstrate a commitment to enhance the profession

Contents

I. PERSONAL AND PROFESSIONAL DEVELOPMENT

- A. Personal Characteristics for Success
- B. Self-Concept
- C. Goals
  1. Personal
  2. Educational
  3. Professional
- D. Business Ethics
- E. Image
  1. Health
  2. Personal grooming
  3. Professional dress
- F. Personal Time Management
- G. Stress Management
- H. The Employment Process
  1. Skills assessment
  2. Employment opportunities
  3. Employment sources
  4. Resume, cover letter, and application form
  5. Interview
  6. Interview follow-up
  7. Employment exit

II. INTERPERSONAL DEVELOPMENT

- A. Human Relations Skills
- B. Problem Solving and Conflict Resolution
- C. Business and Social Etiquette
- D. Influencing Behavior of Others
  1. Assertiveness/responsiveness
  2. Understanding power/empowering others
  3. Leadership/subordinateship
  4. Internal beliefs/expectations

E. Communications Skills
   1. Reception skills
   2. Listening skills
   3. Telephone skills
   4. Nonverbal skills

III. ORGANIZATIONAL DYNAMICS

A. Employee Orientation
B. Organizational Charts, Policies, and Procedures
C. Line and Staff Functions
D. Job Descriptions
E. Teamwork
F. Office Politics and Power
G. Employer/Employee Rights
H. Performance Appraisal

IV. PROFESSIONAL DEVELOPMENT

A. Professional Growth
B. Commitment to the Profession
C. Professional Affiliations
D. Professional Certifications

Endorsed Textbooks

Dimensions in Professional Development (K65)
Reynolds

Applied Business Communications

This course is designed to provide communication skills necessary to speak and write clearly in a business environment.

Students will compose business correspondence, develop and give an oral presentation, practice recording and translating information using the latest technology, and develop effective verbal and nonverbal communication and listening skills. (Prerequisite: Fundamentals of Business Communications)

Considerations

This highly participatory course focuses on both oral and written communications. Points stressed in lectures must be illustrated through active student participation. Student organizations provide an excellent opportunity to apply communications skills. Students should have extensive practice in composing business documents and strive for effective oral communication, not only through formal presentations, but also through all in-class communications. It is recommended that appropriate courseware/software be used to enhance the learning process and the achievement of course objectives.

Objectives

After completing this course, the student should be able to

1. Describe the cycle and methods of communication
2. Develop a message for a specific audience
3. Recognize and apply appropriate speech patterns
4. Organize and deliver an individual or a group presentation
5. Organize and write effective business documents
6. Develop business documents, such as letters, memoranda, reports, minutes, and visuals
7. Use technology to communicate information
8. Describe how the effective use of technology increases productivity

Contents

I. COMMUNICATION SKILLS

A. The Importance of Communication
   1. Personal
   2. Interpersonal
   3. Groups
   4. Communities
   5. Societies
   6. International

B. The Communication Cycle
   1. Basic communication; the role and relationship of sender and receiver
   2. Delivery modes — verbal, nonverbal, and combination

C. Communication Methods
   1. Listening
   2. Speaking
   3. Writing
   4. Reading
   5. Nonverbal

II. PREPARING AND DELIVERING ORAL MESSAGES

A. Defining Purpose
B. Identifying Audience
C. Assembling Facts and/or Concepts
D. Organizing and Outlining
E. Planning
F. Selecting, Preparing, and Using Audio-Visual Aids
G. Speaking Effectively
H. Presenting the Information
I. Forums, Discussions, and Other Types of Presentations

III. WRITING EFFECTIVELY

A. Importance of Effective Writing Skills
   1. To company
   2. To reader
   3. To writer

B. Principles of Effective Writing
   1. How to achieve techniques of effective writing
   2. Practice in eliminating obstacles to effective writing—vagueness, jargon, negativity, wordiness, discriminatory language—through writing, feedback, and revision
   3. Punctuation to aid understanding

IV. FORMULATING WRITTEN MESSAGES

- A. Define Purpose
- B. Identify Audience
  1. Need
  2. Interest
  3. Profile
  4. Possible responses
- C. Types of Business Documents
  1. Letters
  2. Memoranda
  3. Reports
  4. Minutes
- D. Assemble Facts and/or Concepts
- E. Effective Organization
  1. Effective written communications
  2. Patterns of organization
  3. Practice in organizing material effectively through writing, feedback, and revision

V. WRITING BUSINESS DOCUMENTS

- A. Composing and Writing Business Documents
- B. Dictating Business Communications
- C. Editing and Critiquing Business Documents

VI. COMMUNICATION AND TECHNOLOGY

- A. Using Technology to Prepare Communications
- B. Communicating Through Technology
  1. Electronic mail
  2. Voice messaging and storage
  3. Teleconferencing
  4. Telecommunications
  5. Voice input
- C. Using Technology to Increase Productivity

Endorsed Textbooks

Effective Communication for Colleges (E34)
Brantley, Miller

or

Business Communication for the Computer Age (E55)
Rader, Kurth

Advanced Word Processing Applications

This course is designed to enable the student to produce complex documents using advanced word processing functions. Hard disk management and word publishing are important components of this course. (Prerequisite: Information Processing Concepts and Applications)

Considerations

This course is designed primarily for students who require additional skills in word processing or wish to learn a second word processing software package. Students proficient in word processing should take Advanced Information Processing Applications in lieu of this course.

A sophisticated word processing package is necessary to meet the objectives of this course. Select software based on employment opportunities and career levels of the students.

Objectives

After completing this course, the student will be able to

1. Format, categorize, and manage a hard disk
2. Produce complex documents using advanced word processing functions
3. Use word publishing to enhance documents

Contents

I. HARD DISK MANAGEMENT

- A. Concepts of Managing a Hard Disk
- B. Formatting a Hard Disk
- C. Directories and Subdirectories
- D. Batch Files as Required by Software
- E. Custom Menus
- F. Backup

II. SOFTWARE DOCUMENTATION

A. Interpretation
B. Use

III. ADVANCED WORD PROCESSING FUNCTIONS

A. Required Hyphens and Spaces
B. Superscripts and Subscripts
C. Indent Tabs
D. Glossary/Boilerplate Functions
E. Headers and Footers
F. Outlining
G. Math Functions
H. Footnotes/Endnotes
I. Fill-in Forms
J. Sorting, Listing, and Arranging
K. Pagination
L. Merging Capabilities
M. Chain Printing
N. Spell Checker
O. Thesaurus
P. Grammar Verification
Q. Widows and Orphans
R. Scientific Notation
S. Macros

IV. COMPLEX DOCUMENT PRODUCTION

A. Text
B. Correspondence
C. Repetitive Correspondence
D. Tables and Columnar Documents
E. Document Assembly
F. Form Production
G. List Processing
H. Conversion

V. PRINTER CONFIGURATION

VI. TRANSCRIPTION

VII. WORD PUBLISHING

A. Formatting Using Various Type Styles
B. Formatting Using Various Font Sizes
C. Text Page Layout

Endorsed Textbooks

Applied Word/Information Processing: An Introduction (W96)
Dolecheck

or

WordPerfect: A Practical Approach (WM83ABU)
Eisch

or

Working Your Way Through WordStar (W10U)
Graham

or

DisplayWrite 3: A Practical Approach (W20U)
Troop, Woo

or

DisplayWrite 4: A Practical Approach (WM84ABU)
Woo, Troop

or

MultiMate Advantage: A Practical Approach (W18U)
Graham

Advanced Information Processing Applications

This advanced course is designed to enable the student to use spreadsheets, database, and telecommunications software. Hard disk management is an important component of this course. (Prerequisite: Information Processing Concepts and Applications)

Considerations

This course provides the opportunity to teach a different spreadsheet, database, and/or telecommunications software than was used in the Information Processing Concepts and Applications course. The documents and data need to be more complex and the software programs should be more sophisticated. If some of the advanced functions do not exist on the software you select, these can be explained in concept.

Evaluate employment opportunities and consider the career level of the student when selecting the software.

Where employment opportunities and student skill justify it, the Advanced Word Processing Applications course may be used as a substitute for this course.

It is recommended that graphics boards and modems be acquired to achieve the objectives of the graphing and telecommunicating sections.

Objectives

After completing this course, the student should be able to

1. Format, categorize, and manage a hard disk
2. Use spreadsheet software to produce complex documents
3. Use database software to produce complex documents
4. Use telecommunications software to transmit data

Contents

I. HARD DISK MANAGEMENT

- A. Concepts of Managing a Hard Disk
- B. Formatting a Hard Disk
- C. Directories and Subdirectories
- D. Batch Files as Required by Software
- E. Custom Menus
- F. Backup

II. SOFTWARE DOCUMENTATION

- A. Interpretation
- B. Use

III. ADVANCED SPREADSHEET FUNCTIONS AND APPLICATIONS

- A. Creating, Retrieving, Revising, and Storing Spreadsheets
- B. Commonly-Used Formulas
- C. "What If" Questions
- D. Defining Ranges
- E. Changing Formats
- F. Inserting and Deleting Rows and Columns
- G. Copying and Moving
- H. Recalculating
- I. Producing Templates
- J. Exporting a Spreadsheet into a Word Processing Document
- K. Relative and Absolute Values
- L. Setting Print Drivers
- M. Global Commands and Menu Options
- N. File Organization and Management
- O. Converting to Graphs
- P. Macros

IV. ADVANCED DATABASE FUNCTIONS AND APPLICATIONS

- A. Structure and Commands
- B. Guidelines for Effective Design
- C. Creating, Editing, Viewing, Storing, and Retrieving Files
- D. Printing
- E. Creating, Revising, and Printing Reports
- F. Creating, Revising, and Printing Labels
- G. Adding, Deleting, and Revising Records

H. Searching Procedures
I. Creating Formula Specifications
J. Merging Databases with Stored Letters
K. Importing and Exporting Data
L. Sorting and Indexing
M. Hierarchical Database Modeling
N. Relational Database Structures
O. Network Database Structures

V. TELECOMMUNICATING USING MICROCOMPUTERS

A. Data Communications
   1. Micro to micro
   2. Micro to mainframe
   3. Transmission media
   4. Communication interfaces
   5. Communication software
   6. Modes of transmission
   7. Communication protocols
   8. Communication lines
   9. Transmission speeds
   10. Modems
B. Electronic Mail
   1. Sending and receiving mail
   2. Sending and receiving messages
   3. Bulletin board services
C. Voice Based Messaging (Voice Mail)
D. Image Processing
E. Networking
   1. LAN
   2. Star
   3. Ring
   4. Bus
F. Online Databases
   1. Encyclopedia
   2. Official airline guide
   3. Shopping
   4. Videotext

Endorsed Textbooks

Introduction to Telecommunications: The Business Perspective (E58)
Housel, Darden
Integrated Software: Principles and Applications Using Lotus 1-2-3 (J19)
Close

COMPLETE COURSE DESCRIPTIONS
SECOND YEAR

The second year of study is composed of two semesters: career options and professional development. These semesters are designed to give students:

- a broad overview of the entire office function, not only his/her individual position.
- an opportunity to investigate the integration of systems—people and technology.
- an exposure to career options available within the office which involve the management of people and equipment resources, as well as an opportunity to recognize the relationship between worker and supervisor.
- to prepare and sit for the Certified Professional Secretary (CPS) Examination and complete the testing component for professional certification.

NOTE: An institution may elect to schedule one specialty course each semester. This would alleviate difficulties if an institution were to select specialty areas other than the ones listed here, where the second course might be a prerequisite to the first. Notice also that an institution has the option of utilizing specialty areas which may already be a part of their curriculum.

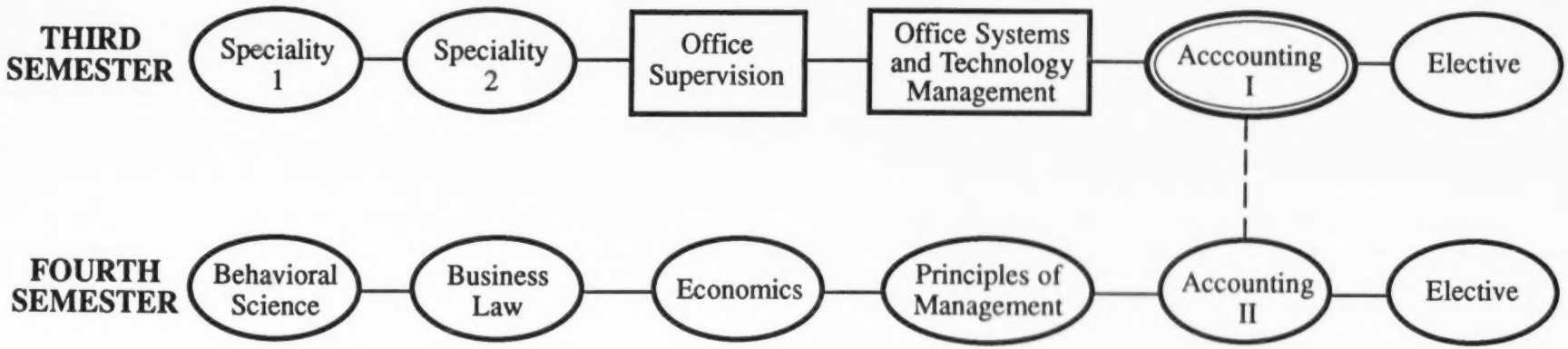
Certain specialty area courses noted in the PSI curriculum have been developed by allied associations contacted by PSI. It was felt that specialty courses would be developed best by those associations who had a commitment to certain office careers and have documented the knowledge, skills, and attitudes needed for these specialties. Full descriptions of each of the courses, objectives, and content outlines are available by request from South-Western Publishing Company.

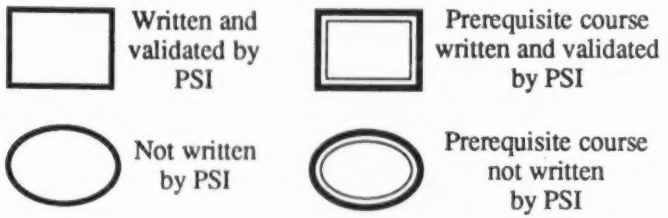
Student Outcomes of the Second Year

- Increased employability
- Office career options
- Certificate of completion
- CPS rating
- Associate degree
- Recertification knowledge /skill development

PSI Postsecondary Model Curriculum

Second Year of Study




Written and validated by PSI
Prerequisite course written and validated by PSI
Not written by PSI
Prerequisite course not written by PSI

Qualifications: PSI CPS Rating

Office Supervision

This course is designed to develop supervisory skills. Topics include the role of the supervisor, economics of work, supervisor as manager of people, and the office environment.

Objectives

After completing this course, the student should be able to

1. Describe the role of the supervisor
2. Explain the relationship between supervising and managing
3. Recognize the economics of work and its relationship to a standard of living
4. Describe and apply supervisory skills including communicating, managing, delegating, decision making, organizing, and planning
5. Identify procedures for employing and terminating personnel
6. Explain the importance of retraining and retraining methods
7. Explain the management of the office environment
8. Describe the methods of measuring and controlling office productivity

Contents

I. THE SUPERVISOR'S ROLE

- A. Defined Supervision
- B. Relationship Between Supervising and Managing
- C. Management Styles

II. THE ECONOMICS OF WORK

- A. Defined Work

B. Relationship Between Work and a Standard of Living
C. Organizational Structure
D. Role of Office Support Staff in Business

III. SUPERVISORY SKILLS

A. Communication Skills
B. Management Skills
C. Delegating Skills
D. Decision-making Skills
E. Organizing and Planning Skills
F. Evaluation Skills
G. Human Relations Skills

IV. THE SUPERVISOR AS A MANAGER OF PEOPLE

A. Recruiting, Selecting, and Hiring Permanent and Temporary Personnel
B. Motivating and Evaluating Personnel
C. Training and Retraining Personnel
D. Coaching and Counseling
E. Discipline and Grievance Handling
F. Managing Personnel Reduction
    1. Termination
        a. Firing
        b. Layoffs
    2. Reduction
        a. Hours
        b. Outplacement
        c. Transfers
G. Rewarding Personnel
H. Supervising the Group
I. Developing Ethics and Dealing With Office Politics
J. Operating Within Federal Laws
K. Understanding Unions and Special Interest Groups
L. Understanding Organizational Policies

V. THE SUPERVISOR AS A MANAGER OF THE OFFICE ENVIRONMENT

A. Ergonomics
B. Space Management
C. Safety and Accident Prevention

VI. THE SUPERVISOR'S ROLE IN CONTROLLING PRODUCTIVITY

A. Budget Controls
B. Cost Reduction
C. Increasing Employee Productivity Through Efficient Work Procedures
D. Managing Time
E. Qualitative and Quantitative Productivity Measurement

Endorsed Textbooks

Administrative Office Management (G56)
Kallaus, Keeling

or

Administrative Office Management, Abridged (G57)
Kallaus, Keeling

Office Systems and Technology Management

This advanced course is designed to acquaint the student with the management of office systems, technology, and procedures. Topics include the improvement of productivity through technology and systems; optimization of personnel resources; systems selection, configuration, design, and implementation; and procedures development. (Prerequisite: Advanced Word Processing Applications or Advanced Information Processing Applications)

Considerations

A comprehensive case study should be utilized to familiarize students with the importance and use of feasibility studies.

Objectives

After completing this course, the student should be able to

1. Describe the impact associated with managing office automation and systems
2. Identify office automation technologies used in administrative functions in the office
3. Describe office systems and technologies used in the input, output, reprographics, and distribution phases of document production
4. Describe the factors used to justify office systems and technologies
5. Identify career opportunities and career paths in office systems
6. Describe document production using application software
7. Explain the interaction of administrative functions with document processing functions
8. Examine microcomputer technology, operating systems, and software and describe how they interface with mainframe resources
9. Design, develop, and implement procedures for office systems

Contents

I. INTRODUCTION TO OFFICE SYSTEMS AND TECHNOLOGIES

- A. Impact of Office Systems and Technologies
  1. Technological
  2. Behavioral
  3. Organizational
- B. Career Opportunities and Career Paths

II. TECHNOLOGY ACQUISITION

- A. Needs Assessment
- B. Feasibility Study
- C. Equipment Analysis
- D. Cost Justification
- E. Equipment Selection

III. EVALUATING DOCUMENT ORIGINATION METHODS AND TECHNOLOGIES

- A. Methods of Origination
- B. Technologies
- C. Productivity
- D. Justification

IV. ANALYZING DOCUMENT AND DATA STORAGE AND RETRIEVAL

- A. Methods
  1. Paper-based systems
  2. Microimaging systems
  3. Electronic systems
- B. Technologies
- C. Justification
- D. Data Protection and Security

V. EVALUATING COMPUTER SYSTEMS

- A. Microcomputers
  1. Operating systems
  2. Software
  3. Firmware
- B. Minicomputer
- C. Mainframe Computer

D. Interface
E. Integration of Data

VI. SELECTING PRINT TECHNOLOGIES

A. Dot Matrix
B. Daisy Wheel
C. Thermal
D. Inkjet
E. Laser

VII. MANAGING INFORMATION RESOURCES

A. Manual Systems
B. Information Utilities
   1. Public
   2. Proprietary

VIII. MANAGING REPROGRAPHIC TECHNOLOGIES

A. Methods
B. Technologies
C. Justification

IX. TRANSMISSION OF INFORMATION

A. Physical Distribution
   1. Mail
   2. Courier and shopping services
B. Electronic Distribution
   1. Voice-based systems
   2. Image-based systems
   3. Data-based systems

X. NETWORKS

A. Computer and Peripheral Networks
B. Local Area Networks

XI. ORGANIZATIONAL STRUCTURES

A. Administrative Functions
B. Document Production
   1. Centralized

2. Decentralized
3. Cluster units

XII. ERGONOMIC CONSIDERATIONS

XIII. PROCEDURES AND TRAINING CONSIDERATIONS

A. Technology Acquisition and Training
B. Ongoing Training
C. Procedures and Manuals
   1. Justification
   2. Use
   3. Writing and updating

XIV. EMERGING TECHNOLOGIES

Endorsed Textbooks

Office Automation: A Systems Approach (J70)
Ray, Palmer

SEMESTER FOUR
CERTIFIED PROFESSIONAL SECRETARY
EXAMINATION PREPARATION

This semester, the "Professional Semester," prepares an individual for the CPS Examination. Traditional academic courses offered by the institution provide the basics for the six-part examination. Office Administration, Communication, and Office Technology will have been covered previously in the first three semesters. The remaining content is contained in the following traditional courses: Behavioral Science in Business or Applied Psychology, Business Law, Principles of Economics, Principles of Management, and Principles of Accounting I and II. Principles of Accounting I is recommended for semester three because it is a prerequisite to Principles of Accounting II. Each course should contain the information listed in the course outlines to adequately meet the content areas of the CPS Examination.

Behavioral Science in Business/Applied Psychology

This course focuses on principles of human relations and organizational dynamics in the workplace. Specific topics should include:

I. UNDERSTANDING OF THE INDIVIDUAL/SELF
II. GROUP DYNAMICS
III. LEADERSHIP DYNAMICS
IV. INTERPERSONAL COMMUNICATION
V. MANAGING CHANGE
VI. MANAGING CONFLICT
VII. PERSONNEL SELECTION AND DEVELOPMENT
VIII. EDUCATION, TRAINING, AND DEVELOPMENT
IX. UNDERSTANDING HUMAN CAPABILITIES AND LIMITATIONS

Business Law

This course focuses on principles of business law and regulatory legislation. Specific topics should include:

I. PRINCIPLES OF BUSINESS LAW

A. Contracts
B. Bailments
C. Agency

D. Sales
E. Real and Personal Property
F. Insurable Interest
G. Negotiable Instruments
H. Court Procedures

II. REGULATORY LEGISLATION

A. Types of Business Entities
B. Regulation of Industry
C. Regulation of Employment
D. Government Regulatory Agencies
E. Patents and Copyrights

Principles of Economics

Emphasis is placed on understanding the basic concepts underlying business operations. Key economics principles as well as the latest government regulations in business are included:

I. BASIC CONCEPTS OF ECONOMICS

A. Private Property and the Profit Motive
B. Supply and Demand — Effect on Cost and Production
C. Markets — Effect on Prices and Production

II. NATIONAL INCOME AND ITS DETRIMENTS

A. Determination of National Income and Measurement Concepts
B. Fluctuations and Growth of National Income
C. Current Measures of Economic Performance
D. Public Sources of Economic Information

III. FINANCIAL SYSTEM

A. Monetary Standards and Money Supply
B. Credit Creation and Credit Instruments
C. Federal Reserve System and Its Role
D. Commercial Banks, Savings, Financial Institutions, Federal Loan Insurance Agencies, and Banking Services
E. National Monetary and Fiscal Policy

IV. BUSINESS INVOLVEMENT — CURRENT SOCIAL AND ECONOMIC PROGRAMS

A. Conservation of Natural Resources
B. Consumerism
C. Pollution Control
D. Equal Employment Opportunity

V. INTERNATIONAL TRADE

A. Common Markets
B. Balance of Payments and Trade
C. International Finance and Multinational Business Operation

Principles of Management

This course should focus on principles of management and provide a comprehensive overview of the various fields of management. Specific topics should include:

I. NATURE AND FUNCTIONS OF MANAGEMENT

A. Forms of Business Organizations
B. Decision-making Processes
C. Planning
D. Organizing
E. Leading
F. Controlling
G. Communicating

II. FIELDS OF MANAGEMENT

A. Human Resource Management
B. Production Management
C. Marketing Management
D. Public Relations

Principles of Accounting I and II

These courses focus on principles of accounting and the ability to interpret financial data. Specific topics should include:

I. PRINCIPLES AND PROCEDURES

A. Theory and Classifications of Accounts
B. Accounting Cycle

II. BALANCE SHEET ACCOUNTS

A. Accounting for Cash Receipts and Disbursements
B. Accounting for Investments
C. Inventories
D. Property, Plant, and Equipment Records
E. Other Assets
F. Debt Equities (Liabilities)
G. Owner's Equity

III. INCOME STATEMENT ACCOUNTS

A. Revenues
B. Expenses

IV. ANALYSIS AND INTERPRETATION OF FINANCIAL STATEMENTS

A. Balance Sheet
B. Operating Statements
C. Retained Earnings Statements
D. Statements of Changes in Financial Position
E. Comparative Statements
F. Ratios, Percentages, and Turnovers

V. MANAGERIAL ACCOUNTING

A. Cost Analysis
B. Budgets
C. Forecasting

APPENDIX A

PROFESSIONAL SECRETARIES INTERNATIONAL

PSI, established in 1942, is a nonprofit membership association of approximately 42,000 office professionals. The association provides its members with: (1) opportunities to develop leadership skills and abilities; (2) access to educational and professional development activities and resources; (3) opportunities to examine and comment on relevant issues affecting the profession; and (4) input into the future direction of business and office careers.

The following items are available to educators from PSI for a minimal charge:

- educational modules on topics such as leadership and motivation; independent study materials
- audiocassettes and videotapes
- PSI research studies
- CPS review course information, a listing of colleges and universities granting academic credit for CPS, review materials available for CPS
- Professional Secretaries Week® promotional materials
- secretarial career brochures
- FSA®/CSI™ brochures and chapter formation manuals
- activities for chapter programs

PSI administers the Certified Professional Secretary (CPS) program. Certification involves a two-day, six-part examination that covers the following areas of office knowledge and skills: Behavioral Science in Business/Applied Psychology, Business Law, Principles of Economics and Management, Principles of Accounting, Office Administration and Communication, and Office Technology.

PSI has established a recertification program for CPS rated secretaries. Courses in this curriculum could be useful in obtaining that goal. Contact PSI for more information on this program.

The PSI entry-level certification program is under development. Competencies have been identified, and a software program to measure competencies is being created. The entry-level certification will be administered through corporations and educational institutions. This certification program is scheduled to be available in late 1988 or early 1989.

The Secretary® magazine is published by PSI nine times each year. It is obtainable through subscription and provided at no charge to members. Articles are written for office support staff. They include original research on issues affecting the profession and topics of interest to office professionals.

For more information contact: Professional Secretaries International
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(816) 531-7010

APPENDIX B

MODEL FOR EXPANDING YEAR ONE

Expanding to Three Semesters

To expand the first year of study of the Model Curriculum to three semesters, some of the following suggestions are recommended:

- Require both Advanced Word Processing Applications and Advanced Information Processing Applications.

- Divide Advanced Information Processing into two courses. Course I would consist of Parts 1, 2, and 3 of the course outline. Course II would consist of Parts 4 and 5 of the course outline.

- Divide Administrative Support Systems and Procedures into two courses. Course I would consist of Parts 1 and 2 of the course outline. Course II would consist of Parts 3, 4, 5, and 6 of the course outline.

Expanding to Four Semesters

To expand the first year of study of the Model Curriculum into four semesters, follow the above guidelines for three semesters in addition to some of the following suggstions:

- Divide Fundamentals of Communication into two courses. Course I would consist of Parts 1, 2, and 3 of the course outline. Course II would consist of Parts 4, 5, and 6 of the course outline.

- Divide Business Communications into two courses. Course I would consist of Parts 1, 2, and 6 of the course outline. Course II would consist of Parts 3, 4, and 5 of the course outline.

- Select two courses from the third semester of study.

- Select one course from the following: Specialty 1, Specialty 2, Office Supervision, Office Systems and Technology.*

*If the keyboarding prerequisite has not been met, substitute keyboarding for this course (in its appropriate sequence).

APPENDIX C

REDISTRIBUTING CPS PREPARATORY COURSES

The following chart offers a suggested model to use in integrating the CPS preparatory courses throughout all four semesters of study rather than the final semester.

OPTIONAL MODEL: DISTRIBUTING CPS PREPARATORY COURSES OVER ALL FOUR SEMESTERS

Semester 1

Document Formatting*
Administrative Support Systems and Procedures
Fundamentals of Business Communications
Information Processing Concepts and Applications

Electives

A General Education course
Behavioral Science (CPS)

Participation in a student organization is recommended.

*Prerequisite: Keyboarding

Semester 2

Document Production/Word Processing
Professional Development
Applied Business Communications

Choose one:

Advanced Word Processing Applications, *or*
Advanced Information Processing Applications

Electives

Business Law (CPS)
Principles of Management (CPS)

Participation in a student organization is recommended.

Semester 3

Office Systems and Technology Management

Specialty Areas

- information management
- desktop publishing
- office systems
- legal
- medical

Electives

Principles of Accounting I (CPS)
A General Education course

Supervised work experience and participation in a student organization are recommended.

Semester 4

Office Supervision
Principles of Economics (CPS)
Principles of Accounting II (CPS)

Electives

A General Education course
A General Education course
A General Education course

Supervised work experience and participation in a student organization are recommended.

APPENDIX D

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